QUICKSTART GUIDE: MyPlans. CBIZ.com

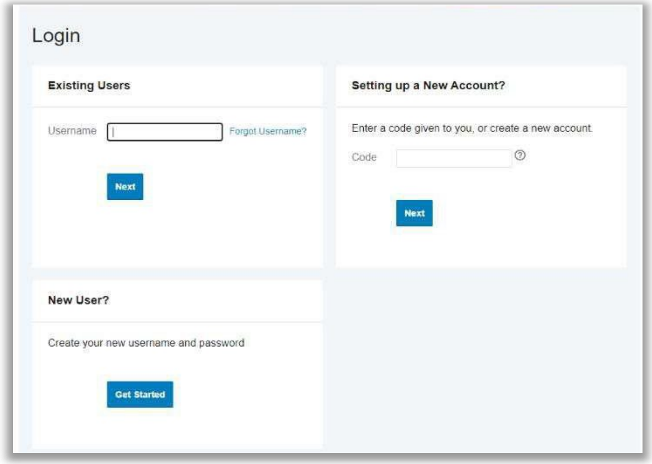
Welcome to your CBIZ Benefit Accounts Online Portal. This one-stop portal gives you 24/7 access to view information and manage your flexible benefits plans. It enables you to:

The portal is designed to be easy to use and convenient. You have your choice of two ways to navigate this site:

1. Work from sections within the Home Page
2. Hover over or click on the four tabs at the top of the page

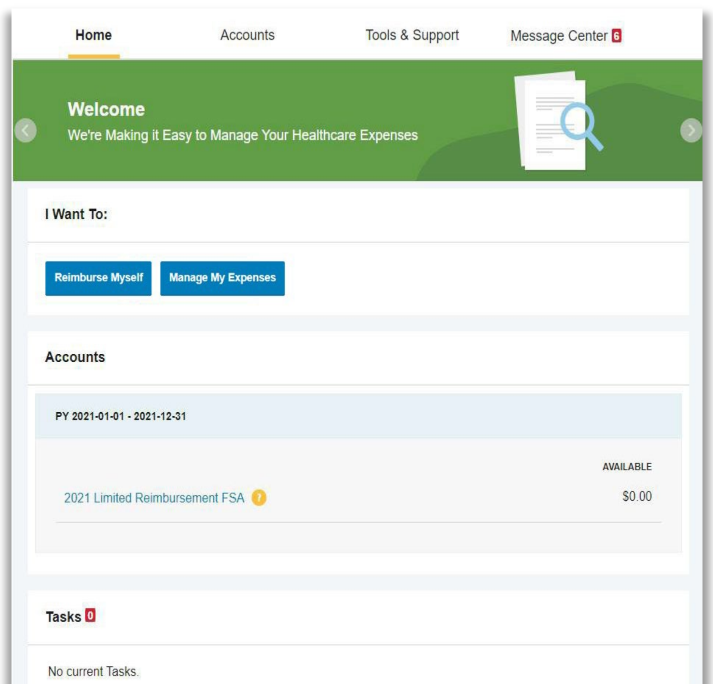
LOG ON TO THE HOME PAGE

1. Go to **https://myplans.cbiz.com**.
2. Locate **New User?** in the bottom left corner of the page.
3. Click on **Get Started**.
4. Follow the instructions for creating a login.



HOME PAGE FEATURES

- Find frequently used features in the **I Want To:** section.
- Easily view your **Available Balance.**
  - Click on the account name to view account activity.
- Alerts will display in the **Tasks** section.
- See key account information under **Quick View.**
- Find more features when you click on one of the tabs at the top of the page.
  - Home
  - Accounts
  - Tools & Support
  - Message Center



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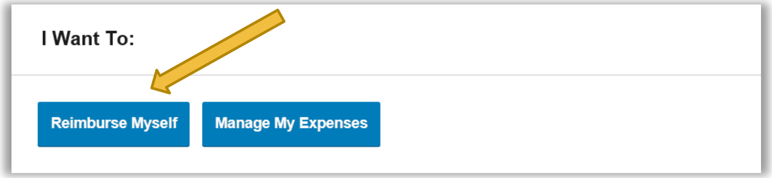
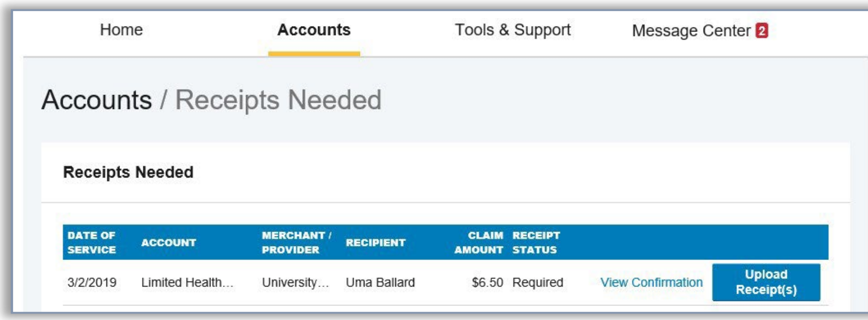
FILE A CLAIM AND UPLOAD A RECEIPT

1. On the **Home Page**, select **Reimburse Myself** under the **I want to:** section.
2. The claim filing wizard will walk you through the process allowing you to enter the needed information and prompt you to upload an image of your receipt.
3. For submitting more than one claim, click **Add Another**, from the **Transaction Summary** page.
4. When all claims are entered in **the Transaction Summary**, agree to the terms and conditions then click **Submit** to send the claims for processing.
5. A **Claim Confirmation** page displays. You may print the **Claim Confirmation Form** as a record of your submission.



NOTE: If you see a **Receipts Needed** link in the Tasks section of your Home Page, click on it. You will be taken to the **Claims** page where you can see the claims that require documentation.



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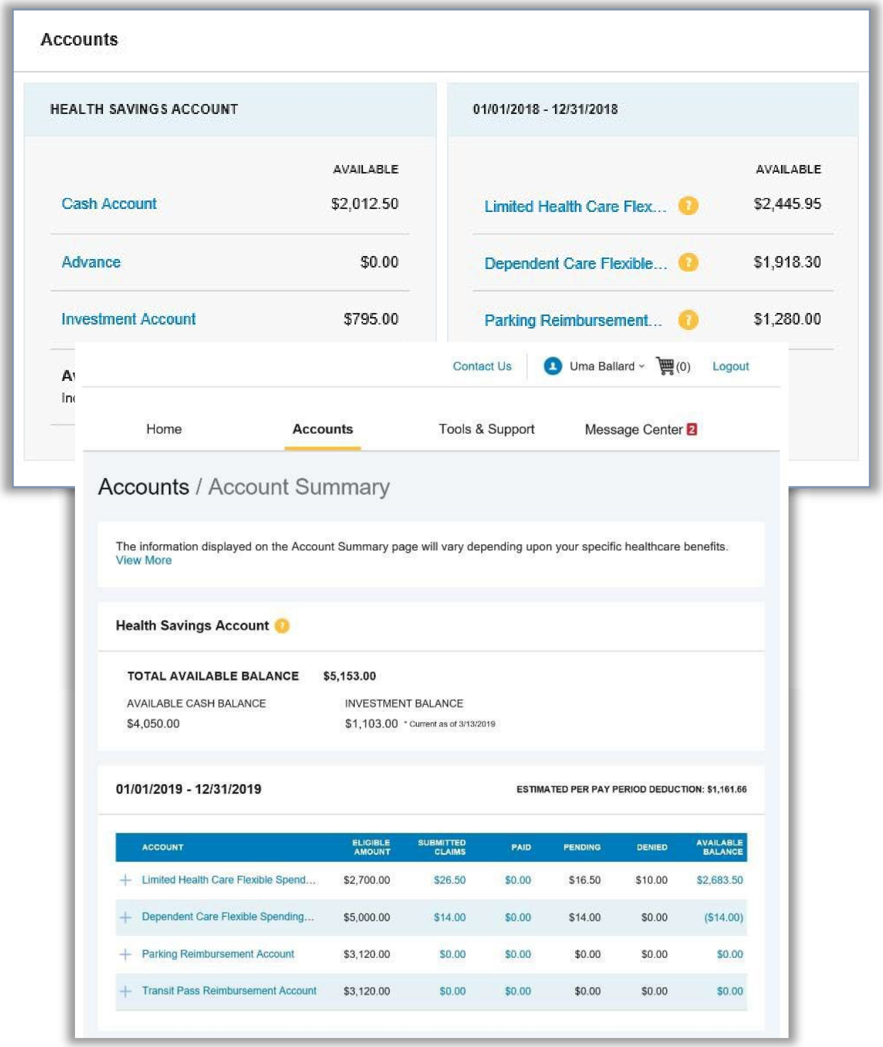
VIEW CURRENT ACCOUNT BALANCES AND ACTIVITY

1. For the current account balance. View the **Accounts** section on the **Home Page**.

2. For all Account Activity, click on the **Accounts** tab from the Home Page to bring you to the **Account Summary** page. Then you may select the underlined dollar amounts for more detail.



NOTE: You can see election details by clicking+ to expand the line item for each account.

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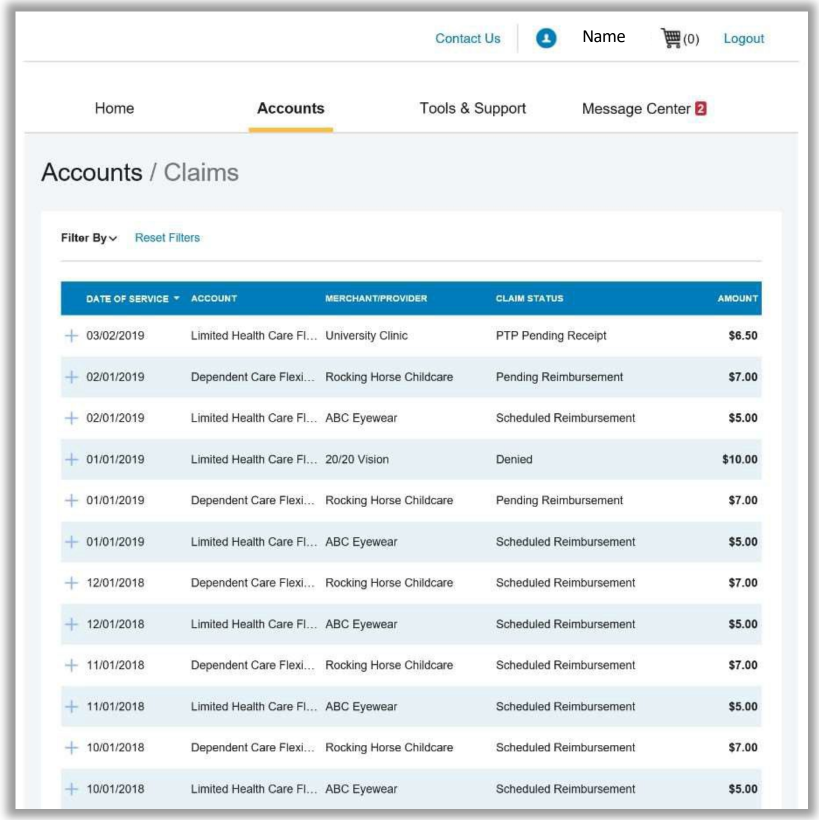
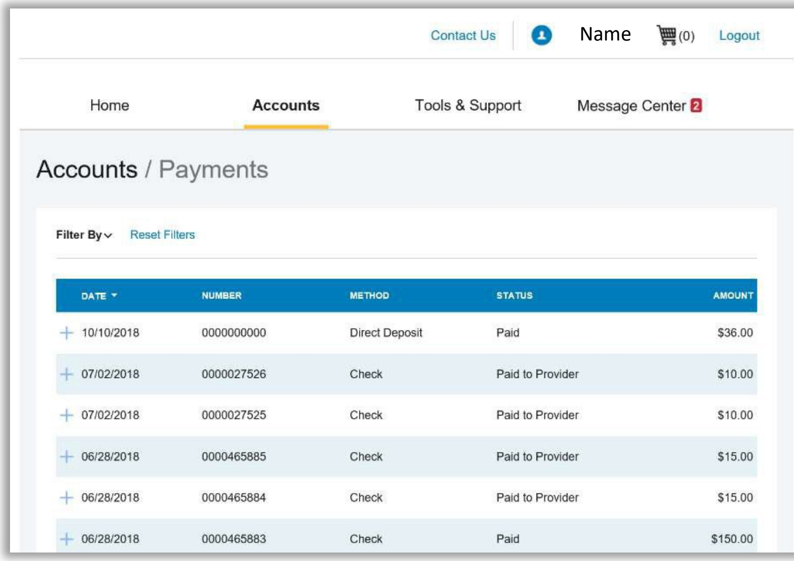
VIEW CLAIMS HISTORY AND STATUS

1. From the **Home Page**, click on the **Accounts Tab,** and then click on the **Claims** link to see your claims history.
2. You can apply filters from the top of the screen and filter by the following:
   - Plan year
   - Account type
   - Claim status
   - Receipt status
3. By clicking on the claim line, you can expand the data to display additional claim details.



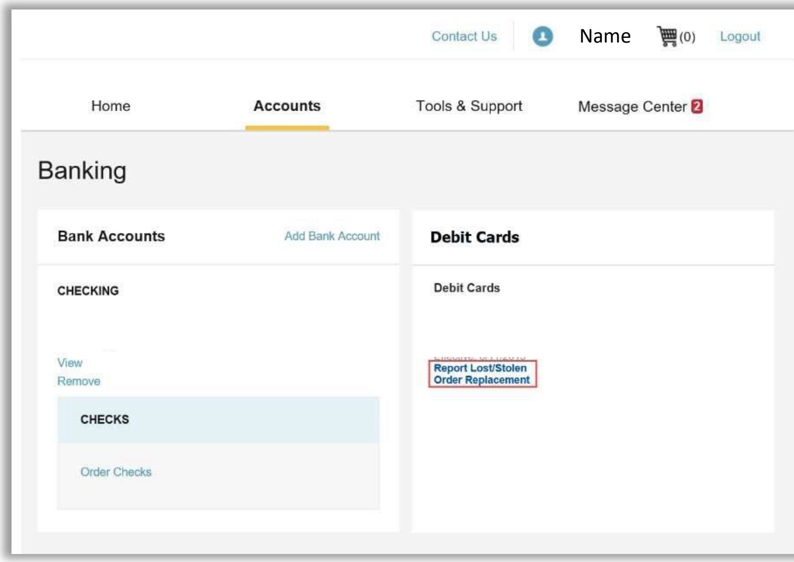
VIEW PAYMENT (REIMBURSEMENT) HISTORY

1. From the **Home Page**, under the **Accounts** tab, click **Payments**.
   - You will see reimbursement payments made to date, including debit card transactions.
2. By clicking on the line of a payment, you can expand the information to display additional details about the transaction.



REPORT A DEBIT CARD MISSING AND/OR REQUEST A NEW CARD

1. From the **Home Page**, under the **Accounts Tab**, click the **Banking** link.
2. Under the Debit Cards column, click **Report Lost/Stolen** or **Order Replacement** and follow the instructions.



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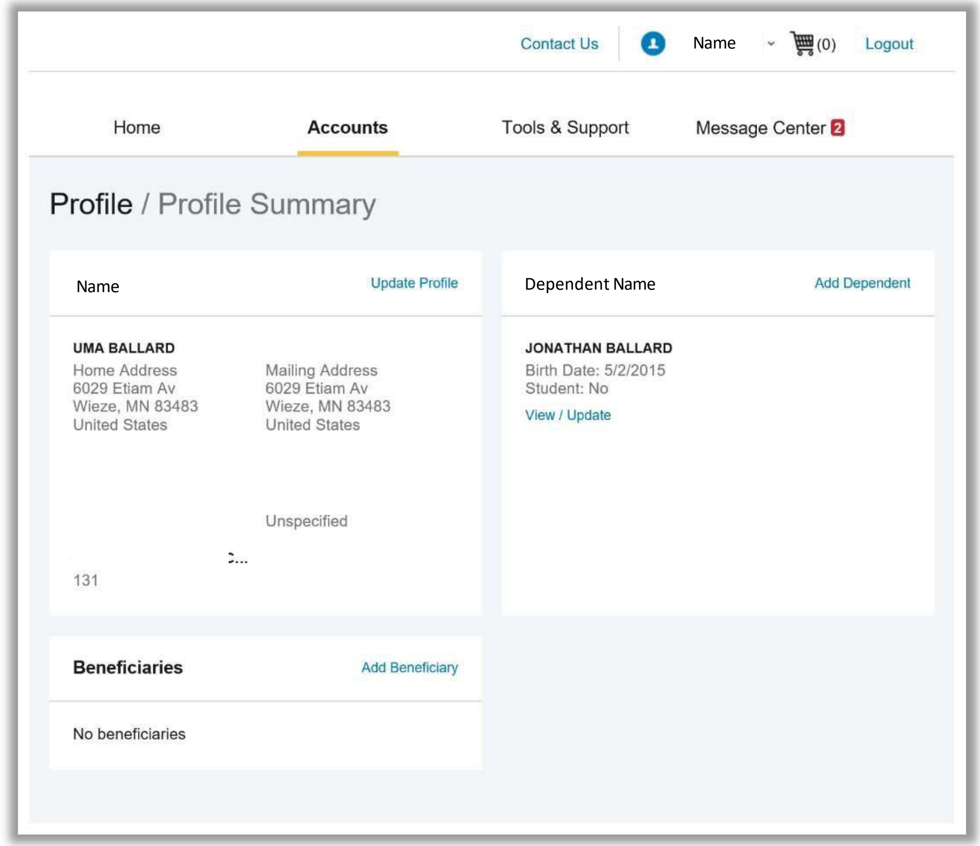
UPDATE PERSONAL PROFILE

1. From the **Home Page**, under the **Accounts Tab,** you will find links to update profile information.
2. Click the appropriate link under Profile to update accordingly:
   - Update Profile
   - Add/Update Dependent
   - Add Beneficiary

   Note: Some profile changes will require you to answer an additional security question.
3. Complete your changes in the online form.
4. Click **Submit.**



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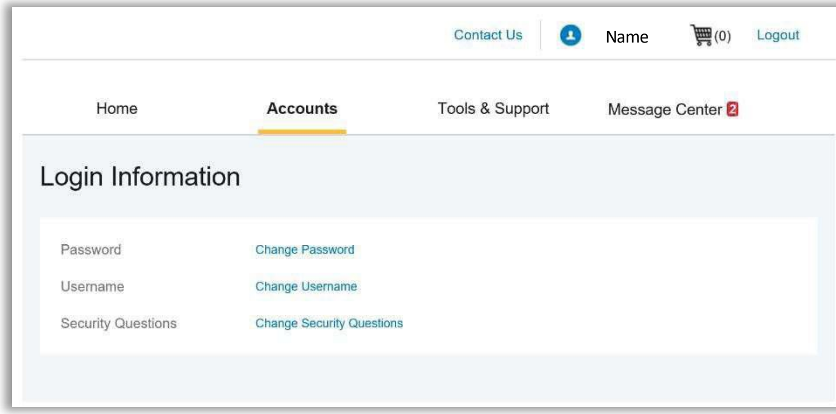
CHANGE LOGIN OR PASSWORD

1. From the **Home Page**, click on the **Accounts Tab**, and click **Login Information**.
2. Follow the instructions on the screen.
3. Click **Save**.



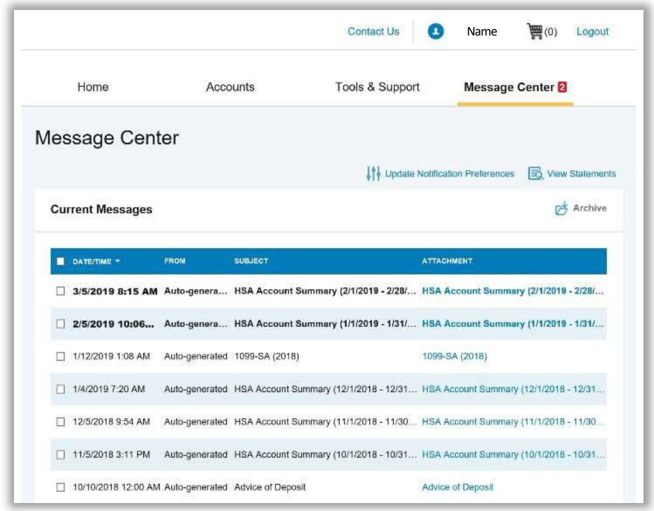
VIEW OR ACCESS

DOCUMENTS & FORMS

1. From the **Home Page**, click the **Tools & Support** tab.
2. Click any form or document of your choice.

NOTIFICATIONS

1. From the **Home Page**, click the **Message Center** tab.
2. Click any link of your choice. You will be able to view and archive current documents, as well as reference documents archived previously.
3. In addition, you can **Update Notification Preferences** by clicking on the link next to **Notifications**.



Need Additional Set Up Assistance?
Contact us at CBIZFlex@cbiz.com.

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